



PRIVACY POLICY STATEMENT

Resilience Wealth Advisors, LLC considers the privacy of its clients to be of fundamental importance and has established a policy to maintain the confidentiality of the information you share with us.

In providing asset management, financial planning, and business consulting services to you, we collect certain nonpublic information about you. Our policy is to keep this information confidential and strictly safeguarded, and to use or disclose it only as needed to provide services to you, protect data, or as permitted or required by law. This policy is applicable to information for current and former clients. For former clients we only maintain records that are required to be maintained for the period required by federal and state securities laws. After that time, information may be destroyed without notice to you.

Information we collect

The personal information we collect directly from you includes information required to communicate with you and assist us in effectively addressing your financial needs. This information could include:

- *Your name and address*
- *Investment objectives and experience*
- *Financial circumstances*
- *Account balance and account transactions*
- *Social security number*
- *Employment information*
- *Debt service information*
- *Insurance information*
- *Estate planning information*
- *Tax return information*

We collect your personal information, for example, from the following sources:

- *Information we receive from you on our financial planning and risk tolerance questionnaires,*
- *Information from documents you provide us (e.g., tax returns, estate documents, debt statements, insurance policies, investment statements), and*
- *Information about your transactions with us or others*

We also collect your personal information from others such as custodians, broker/dealers, and other companies.

How information is used

All financial companies need to share client personal information to run their everyday business. We use information about you to provide our asset management and financial planning services to you to help you meet your personal financial goals. We may disclose the information to third parties as permitted by law, including the broker/dealers, custodians or other companies used to provide services to you and execute securities transactions on your behalf. From time to time, we may be required to give information about our business to regulatory authorities. This may include personal information about you.

We do not or sell your personal information to anyone or provide your personal information to anyone for marketing purposes.

How information is safeguarded

We are committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us. We maintain a secure office to ensure that your information is not placed at unreasonable risk. We require confidentiality in our agreements with unaffiliated third parties that have access to your personal information, including financial service companies, consultants, and auditors.

Contact information

We will notify you if our privacy policy changes. If you have any questions, concerns, or comments about our privacy policy, you may contact us at 704-593-6482.